



# Tasks/Reminders



## Module Learning Objectives:

**After completing this module, you will be able to:**

- View the Virtual Worker's Tasks/Reminders
- Create a Task/Reminder
- Dispose of a Task/Reminder



## What are Tasks/Reminders?

- **Tasks/Reminders are electronic notices that are either:**
  - Automatically created by IES to notify you or management of required work or information
  - Manually created by IES users
- **Tasks/Reminders can be accessed from:**
  - The **Tasks/Reminders** function on Left Navigation



## Tasks and Reminders Key Concepts:

- Reminders are informational
- Some Tasks/Reminders will direct you to take action on an application or case
- All Tasks/Reminders are assigned to the Intake Virtual Worker
- Escalated Tasks/Reminders are written in **red** text
- You can “dispose” of Tasks/Reminders when the required work is complete, or when you have viewed its contents
- Manager should assign staff to monitor the Virtual Worker’s Tasks/Reminders
- Some Tasks/Reminders are automatically disposed by IES when the required action is complete



## Tasks/Reminders- FAQ

**Will my office receive a Task/Reminder when a new application is routed to us?**

**Answer:** Yes, offices receive a new Task in the EDM Inbox when a new ABE application is routed to the office for Intake. Once registered, IES assigns the application to the Intake Virtual Worker and routes the Task to the appropriate Data Collection queue based on the programs requested and the household circumstances.

For paper applications that are entered into IES, a Task is only created if the application is manually uploaded into IES and routed to the appropriate Data Collection queue.

On the **Tasks/Reminders** page, a Task/Reminder is generated for the Intake Virtual Worker if a new application was transferred from another office and assigned. Managers should assign workers to monitor the Intake Virtual Workers Tasks/Reminders.



## Very Important!

- IES generated Tasks/Reminders display on the **Tasks/Reminders** page. Manually created Tasks/Reminders are created and displayed in the EDM section of Left Navigation in the appropriate queue. You can **ONLY** create manual Tasks/Reminders on the **Upload Documents/Create EDM Tasks** page
- Tasks/Reminders are automatically assigned Due Dates
- All due dates are in the future and based on the programs requested and the application received date.
- To find “new” Tasks/Reminders, you must search for **future** Due Dates
- As a best practice, Managers should assign staff to search for new Tasks/Reminders assigned to the Virtual Worker every day



# NEXT STOP

